



**STATE ASSESSORS BOARD  
REGULAR MEETING MINUTES OF JULY 23 AND 24, 2007  
Park Place Hotel, Room Courtyard I  
300 East State Street, Traverse City, Michigan**

**CALL TO ORDER:** The July 23, 2007 meeting of the State Assessors Board was called to order at 9:00 a.m. in room Courtyard I of the Park Place Hotel, 300 East State Street, Traverse City, Michigan.

**ROLL CALL:**

Members present: Lisa A. Hobart, Chairperson  
Henry O. Allen, Vice Chairperson  
Maxine J. McClelland, Member  
Raman A. Patel, Member

Member absent: Frederick W. Morgan (excused)

Staff present: David C. Lee, Executive Secretary

**APPROVAL OF MINUTES:** A motion was made by Patel and seconded by McClelland to approve the regular meeting minutes of the June 21, 2007 meeting of the State Assessors Board as presented. The motion was unanimously approved.

**PUBLIC COMMENT:**

1. Mr. Richard Sharland inquired regarding the availability of proposed minutes. The Executive Secretary advised that, although proposed minutes would no longer be posted on the Internet, proposed minutes could be obtained by contacting the Executive Secretary.
2. Ms. Molly Whetstone offered assistance to the Board on behalf of Wexford County with regard to the planned 2008 renewal program and expressed a desire for the Board to provide assistance with securing a suitable meeting facility in her area.
3. Mr. Jan Markowski provided an update to the Board regarding the status of the Michigan Assessors Association (MAA) 2007 course offerings. As part of this update, Mr. Markowski noted that a new course on economic condition factor analysis had been developed for the 2007 year and that a request for 2007 six-hour renewal credit would soon be submitted to the Board for this course. Mr. Markowski also stated that the MAA had already developed a course on appraising single-family residential property and a course on the application of new, loss, additions, losses, and adjustment. He noted that these three courses would be an excellent supplement to the Board's planned 2008 renewal program.

**STATE ASSESSORS BOARD 2007 ANNUAL REPORT:** A motion was made by Patel and seconded by McClelland to approve the Board's 2007 Annual Report. The motion was unanimously approved.

## **EDUCATIONAL PROGRAMS:**

1. The Board received a communication from the Executive Secretary summarizing the June 25, 2007 Assessment Administration Compliance Committee meeting held to develop the 2008 certification renewal program.
2. A motion was made by McClelland and seconded by Patel to approve an educational renewal credit request for a program titled "Current Assessment Administration Topics" to be held August 15, 2007 at the MAA 2007 conference. The motion was unanimously approved.
3. A motion was made by Allen and seconded by Patel to approve an educational renewal credit request for an International Association of Assessing Officers course titled "Course 600—Principles and Techniques of Cadastral Mapping". The motion was unanimously approved.
4. The Board received a communication from the Executive Secretary regarding six-hour renewal evaluations.
5. A motion was made by Patel and seconded by Allen to approve two level three experience qualification requests. The requests were from Ms. Amanda Marshall and Ms. Jennifer L. Shepardson. The motion was unanimously approved.

**CERTIFICATION LEVEL MATTERS:** A motion was made by Allen and seconded by Patel to waive the level 4 unit requirements for East China Charter Township, St. Clair County, on the basis that a level 4 assessing officer has assumed responsibility for assessing the power plant property that causes the Township to exceed the commercial/industrial state equalized value stated in the level 4 unit requirements. The motion was unanimously approved.

**CERTIFICATION APPLICANTS:** A motion was made by McClelland and seconded by Patel to approve the list of certification applicants provided to the Board. The motion was unanimously approved. The list of certification applicants which was approved by the Board and the certification totals presented to the Board were as follows:

### **Certification Applicants July 11, 2007**

#### **Level 1**

Baldarotta, Sarah L.  
Carnell, Donna  
Casselman, Russell W.  
Clark, Betty L.  
Dotson, Paula

Jenkins, Mark  
Maurer, Lynn  
McKenzie, Debra  
Patterson, Jason  
Roman, Christopher

Taylor, Sherry L.  
Thayer, Jeffrey  
Thompson, Michelle L.  
Tucker, Marietta A.

#### **Level 2**

Babbitt, Denise M.  
Badgley, Bruce A.  
Barber, Jean A.  
Bruner, Kimberly  
Casselman, Russell W.

Coon, Janette M.  
Lindberg, Judy S.  
Little, Sr., Carl N.  
Lumsden, Howard  
Lykins, Jacki M.

Moceri, Brent D.  
Reinheimer, Denise  
Roman, Christopher  
Russell, Amy L.

## **CERTIFICATION APPLICANTS (Continued):**

	<b><u>Level 3</u></b>	
Feazel, Sheryl	Schultz, Terry D.	Walker, Michael T.
Jacob, Tiffany R.	Scott, Ruth A.	Zemla, Charles S.
Roenicke, Franklin	VanVelzen, Marcia J.	

### **Certification Totals July 11, 2007**

Level 1	620
Level 2	962
Level 3	875
Level 4	<u>147</u>
<b>Total</b>	<b>2,604</b>

**FIRST CLOSED MEETING:** A closed meeting was permissible under the Open Meetings Act, Michigan Compiled Law (MCL) 15.268(h). (See also the Freedom of Information Act, MCL 15.243(1)(b)(ii), 15.243(1)(d), and 15.243(1)(k) and the Open Meetings Act, MCL 15.267(2).) A motion was made by Patel and seconded by McClelland to go into closed session. A roll call vote occurred: Hobart—yes, Allen—yes, McClelland—yes, and Patel—yes. The motion was unanimously approved.

The closed session was held and the following items were reviewed by the Board:

1. Closed meeting minutes of June 21, 2007
2. Revocation petition 07-0005
3. Proposed subject properties
4. Grading notes for narrative appraisal 198

A motion was made by Patel and seconded by McClelland to return to open session. A roll call vote occurred: Hobart—yes, Allen—yes, McClelland—yes, and Patel—yes. The motion was unanimously approved.

### **OPEN MEETING ACTIONS ON FIRST CLOSED MEETING ITEMS:**

1. A motion was made by McClelland and seconded by Patel to approve the closed meeting minutes of June 21, 2007 as altered by the removal of the word “decided” from the minutes to make it clear that the Board had not reached decisions in the June 21, 2007 closed session. The motion was unanimously approved.
2. A motion was made by McClelland and seconded by Patel to dismiss revocation petition 07-0005. The motion was unanimously approved.
3. A motion was made by Patel and seconded by McClelland to approve the proposed narrative appraisal subject properties with cautions to be provided where appropriate by the Executive Secretary regarding the properties. The motion was unanimously approved.

## **OPEN MEETING ACTIONS ON FIRST CLOSED MEETING ITEMS (Continued):**

4. A motion was made by McClelland and seconded by Patel to offer the level 4 candidate who submitted narrative appraisal 198 the option of having any second submission of narrative appraisal 198 graded by a different grader than the grader who had graded the first submission. The motion was unanimously approved.

**COMMUNICATION:** A motion was made by McClelland and seconded by Patel to accept a letter from former Executive Secretary Joan Peoples declining service on State Assessors Board committees and to commend her for her years of service. The motion was unanimously approved.

**FIRST MEETING RECESS:** The meeting recessed at 10:50 a.m. to allow Chairperson Hobart to present the Board's 2007 Annual Report at the annual meeting of the Michigan Association of Equalization Directors (MAED). The meeting reconvened at 1:00 p.m.

### **ROLL CALL:**

Members present: Lisa A. Hobart, Chairperson  
Henry O. Allen, Vice Chairperson  
Maxine J. McClelland, Member  
Raman A. Patel, Member

Member absent: Frederick W. Morgan (excused)

Staff present: David C. Lee, Executive Secretary

**SECOND CLOSED MEETING:** A closed meeting was permissible under Michigan Compiled Law (MCL) 15.268(h). (See also the Freedom of Information Act, MCL 15.243(1)(b)(ii) and 15.243(1)(k).) A motion was made by McClelland and seconded by Patel to go into closed session. A roll call vote occurred: Hobart—yes, Allen—yes, McClelland—yes, and Patel—yes. The motion was unanimously approved.

The closed session was held and the following items were reviewed by the Board:

1. Narrative appraisal 202
2. Multiple revocation petitions filed by the same party against the certification of an assessing officer

A motion was made by McClelland and seconded by Patel to return to open session. A roll call vote occurred: Hobart—yes, Allen—yes, McClelland—yes, and Patel—yes. The motion was unanimously approved.

## **OPEN MEETING ACTIONS ON SECOND CLOSED MEETING ITEMS:**

1. A motion was made by McClelland and seconded by Patel to receive narrative appraisal 202, along with the grader's grading sheet and notes, and have the Executive Secretary schedule an oral examination for the level 4 candidate since the narrative appraisal had received a passing grade from the grader. The motion was unanimously approved.

## **OPEN MEETING ACTIONS ON SECOND CLOSED MEETING ITEMS (Continued):**

2. A motion was made by McClelland and seconded by Allen for the Executive Secretary to proceed with the processing of multiple revocation petitions filed by the same party against the certification of an assessing officer. The motion was unanimously approved.

## **FIRST WORK SESSION ITEMS:**

1. Several State Assessors Board policies were reviewed and discussed. Discussion touched on developing policies where needed and formalizing existing policies and procedures. Also discussed was the possibility of making administrative rule changes.

2. Significant discussion occurred with regard to changing the requirements to attain level 1 and level 2 certification. This discussion covered the possibility of changing the exams for level 1 and level 2, the possibility of changing the Board's administrative rules to add an experience requirement for those seeking these levels of certification, the possibility of adding a set of required courses to attain level 1 and level 2 certification, and the possibility of establishing a mentoring program for those entering the field of assessment administration. The possible involvement of the Assessment Administration Compliance Committee was discussed, as was the involvement of the Executive Secretary in recommending an option to the Board.

**THIRD CLOSED MEETING:** A closed meeting was permissible under Michigan Compiled Law (MCL) 15.268(a) and 15.268(h). (See also the Freedom of Information Act, MCL 15.243(1)(b)(ii).) A motion was made by Patel and seconded by McClelland to go into closed session. A roll call vote occurred: Hobart—yes, Allen—yes, McClelland—yes, and Patel—yes. The motion was unanimously approved.

The closed session was held and revocation petitions 06-0030, 06-0031, 06-0034, and 06-0035 were reviewed and discussed by the Board.

A motion was made by McClelland and seconded by Patel to return to open session. A roll call vote occurred: Hobart—yes, Allen—yes, McClelland—yes, and Patel—yes. The motion was unanimously approved.

**OPEN MEETING ACTION ON THIRD CLOSED MEETING ITEM:** Discussion occurred with regard to having the assessor named in the petitions describe in writing why property had been omitted from the assessment roll between an initial 14-point review and the follow-up 14-point review. Discussion also occurred regarding the possibility of having the current contractual assessor and the equalization director for the County appear before the Board at the Board's September meeting.

## **SECOND WORK SESSION ITEMS:**

1. The proctoring of exams was discussed.
2. The three-year limit starting with approval by the Board of a narrative appraisal subject property to complete level 4 requirements was discussed.
3. The determination of unit certification levels was discussed.

## **SECOND WORK SESSION ITEMS (Continued):**

4. No discussion occurred on the subject of certification level reduction requests, other than the possibility of adding this matter to the August 2007 meeting of the Board.

**SECOND MEETING RECESS:** The meeting recessed at 3:30 p.m. for the day. The meeting reconvened at 8:00 a.m. on Tuesday, July 24, 2007.

### **ROLL CALL:**

Members present: Lisa A. Hobart, Chairperson  
Henry O. Allen, Vice Chairperson  
Maxine J. McClelland, Member  
Raman A. Patel, Member

Member absent: Frederick W. Morgan (excused)

Staff present: David C. Lee, Executive Secretary

## **THIRD WORK SESSION ITEMS:**

1. Recertification renewal fees were discussed. Discussion covered the control and changing of the fees, including the possibility of equalizing level 1 and 2 fees with level 3 and 4 fees. Also discussed was the use of the fees and the possibility of development of a line-item budget to gauge desired fee levels.

2. The plans for the 2008 renewal program were discussed, including the desirability of having the program included in the annual MAA, MAED, and Michigan Townships Association conferences.

3. Charges for home study course materials provided to an instructor and charges for the Uniform Standards of Professional Appraisal Practice (USPAP) mail-in program were discussed. It was discussed that home study course materials are available free of charge to a State Assessors Board instructor or committee member for six-hour renewal instruction purposes. It was also discussed that home study courses are available to instructors wishing to teach from the course materials. In those cases, the instructors are required to pay for the home study course and students taking the course exam must each pay the exam fee; however, the students are not also required to pay for the course materials. Lastly, the need to ensure that the USPAP mail-in program is ordered no more than once by an assessing officer in the five-year USPAP period was discussed, as was the apparent need to add a lab fee for the USPAP mail-in program to cover the expense of the USPAP book provided in the mail-in program materials.

## **OTHER BUSINESS:**

1. The addition of general correspondence to the agenda was discussed.

2. A motion was made by Allen and seconded by Patel to use the most current valuation information available and, specifically, to use 2007 valuation information in establishing unit certification levels for 2009 and to notify the affected parties. The motion was unanimously approved.

**ANNOUNCEMENTS:** The next meeting of the State Assessors Board is scheduled for August 13 and 14, 2007 at the MAA conference in Dearborn.

**ADJOURNMENT:** The meeting adjourned at 9:15 a.m.

**Date minutes typed:** July 31, 2007

**Date minutes approved:** 8-13-07

  
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Lisa A. Hobart, Chairperson